

Mini-profile:

a day in the life of a consortium executive officer



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Executive Officer, CAUL and Manager of CEIRC

Diane is pictured here with Will Pesce, President & Chief Executive Officer, John Wiley & Sons, Inc

The day described is 29 November 2006, and since November/December are our busiest months of the year, I drop my 'day job' almost entirely and focus on the finalization of invoices and payments for our consortial subscriptions for 2007.

My day job is Executive Officer to CAUL, the Council of Australian University Librarians – secretariat for CAUL's committees and programmes, webmaster, information conduit, events and travel organizer, and manager of our largest programme, CEIRC – CAUL's Electronic Information Resources Committee – the consortial purchasing programme. For comparison purposes, CAUL is a kind of mini-SCONUL or a micro-ARL. CEIRC is a mini-NESLI, without the infrastructure. There are two of us here in the office, supplemented by some book-keeping and filing assistance – so when invoicing calls, it is all hands on deck.

Our book-keeper is in today, entering receipts and payments, and reconciling the four accounts – we handle AUD, USD, £ and EUR currencies for CEIRC subscriptions. She has been unable to reconcile a few items on the bank statements, so my problem-solving hat is on – one is a duplicate payment made last month by one of our members, so the original payment has already been processed and reconciled and this one will be coded to 'suspense'; two others are payments from CEIRC subscribers with anonymous references on the bank statements, and no payment advice received either from the institution or the bank, but able to be deduced from the accounts receivable summary. Another receipt is completely unidentifiable so I drop an e-mail to our 'relationship manager' at the bank, and cross my fingers.

Overnight, invoices have arrived from Emerald, AAAS and ASM, so I pull out our spreadsheet of responses to renewals and the e-mails I sent to the publishers confirming the 2007 subscribers and go to work entering the purchases and the invoices. We process the invoices as they arrive but only e-mail them out to our subscribers once a week, to encourage our institutions to pay in batches – bank fees are grossly expensive, so the fewer transactions the better.

I do a final read through of the licences for AIP/APS and for NEJM, sign them, and post them off. A relatively small proportion of licences are signed centrally, though we tend to have a single version of a 'CAUL' licence for each of our consortial agreements available from our website for reference and as an archival record.

I take a call from the new Britannica representative who is just introducing herself. I have a running gag with Britannica – I have been here for 11+ years, and they have turned over seven contact people for CAUL in that time! Every new account manager means a re-education about who we are and what we do, both for our members and for the vendors. Come to think of it, every new Datasets Coordinator in my own institutions means a re-education about our programmes and processes – whatever happened to internal knowledge transfer?

The next call is from the accountant from Aspect Huntley. Our invoice for FinAnalysis and DatAnalysis arrived a week ago, but one of our New Zealand subscribers had been charged GST (the Australian goods and services tax) and the invoice needed to be reversed and two created in its place – one with and one without the GST. Fortunately, we only have to deal with the tax for Australian vendors, as all our international electronic purchases are GST-free.

Earlier, I returned a call from the Education Officer at a correctional centre in Wollongong. She asked about access for one of the residents to our ULA programme. University Libraries Australia facilitates in-person borrowing from any of our universities' staff and students to any other university library in Australia. The student in question is enrolled in a course with Open University Australia, which farms out its course offerings to a number of institutions who have rather different ways of providing resources to their off-campus students. ULA would normally be one avenue of access to resources, but not if the

student cannot be there in person. My next call will be to the library of the institution offering this particular course to confirm the services they do offer to OUA students, and go from there

A bonus today is lunch with our Wiley representatives, Eva-Maria Scheer, who is based in Sydney, and Eileen Dolan, the regional manager in Singapore. We are just finalizing the paperwork on our third three-year agreement for 61 institutions – all 39 Australian universities plus all eight New Zealand universities plus 14 government and research institutions in Australia and New Zealand. The high-volume buy-in allows us to reduce access costs to the non-subscribed titles, and our longer-term commitment has bought improved ongoing terms, particularly for our large institutions. The news about the merger with Blackwell Publishing is still so fresh that there is no real information yet about how we will be affected. On the other hand, we have just finalized a three-year agreement with Blackwell so perhaps we don't need to be concerned for another couple of years. Lunch is excellent – don't let anyone tell you that Canberra doesn't have any good restaurants – and the conversation energizing, ranging across society publishers moving titles between publishers, open access, travel, consortial management, travel, pricing models (particularly for new and transfer titles), travel, etc.

Back to the office to find a new offer from an old vendor. Although I ask all our vendors to provide me with their renewals information for 2007 by the end of August (lots of flying pigs here, though we do have excellent responses from some), we accept new offers at any time. You never know if it is the product that an institution has been waiting for, or if there is some money left in the budget at the end of the year – particularly when 80% of our content is purchased off-shore and the final costs depend on the exchange rates. WordGenius is a desktop 'drag-on' that allows immediate verification against the *Macquarie Dictionary and Thesaurus* – they are offering institution-wide unrestricted licence to universities. It is a move away from the kind of product we usually deal with, but neither is there any other obvious way of marketing to the broader university community. (Don't ever say we aren't flexible.) Preparing the offer for members involves reviewing all documentation for completeness and clarity – and sending follow-up questions if not – adding a new web page for the vendor or updating the current page; linking

documents and websites as appropriate and uploading those documents; adding a new listing to the CEIRC offers page, and to the information providers page if new; sending an e-mail to the datasets list to let members know the offer is available and when they need to respond, etc., then sit back and wait for the responses to come in.

Time to send out a follow-up for participants in Portico, before the deadline for the Founders' discount. As with all JSTOR/ARTstor/Portico collections, the institutional licences have to be received in New York. We have seven takers so far, and another couple pending.

Next, review press releases in the inbox: from DEST, the federal department of education (the main funder of Australian universities), from the Carrick Institute, government funded to enhance the quality of university teaching and learning – to see what is relevant to my members and worth linking to our 'what's new' page. It isn't a blog *per se*, but provides an alerting service for members and others in higher education and libraries here and elsewhere, and has become quite popular. The key question to ask when reviewing events, reports, publications, organizations, media releases, etc., for their place on our site is whether my members would be interested (*vis à vis* their work interests) or otherwise need to know.

Then it's time to finalize arrangements for January/February meetings, like the Sydney Online conference, held every two years. The trade exhibition gets bigger every year, more publishers' head office representatives visit, most of my institutions are represented and many of the CAUL members themselves attend. It is a good time to arrange meetings while everyone is in town. (Travel in a country our size can be expensive, and we try to keep everyone's costs down by reducing the total amount of travel, if not the time away from the office.) We will have meetings of

the CEIRC committee, the CAUL Executive committee, the ADT (Australasian Digital Theses Programme) Technical Committee, the CEIRC Datasets Coordinators, and a meeting with representatives of the National Library of Australia regarding Libraries Australia (the national bibliographic database and utility). We handle the venues, accommodation and flights for committee members – the venue is the tricky one and I am pleased that the Radisson is again able to accommodate us.



Looking back over the day, the bulk of my focus has been on CEIRC-related activities, as expected at this time of year. I delete about 80 e-mails a day – junk mail, list mail (some read, some not) and ephemeral messages to CAUL that don't need to be filed – but action and file the rest (a similar number). Because I am the keeper of the CAUL archive, all messages of substance are retained and filed. (The e-mail archive goes back to May 1995). All CEIRC-related responses are pushed to my admin officer for recording and otherwise processing where appropriate, so I can handle these fairly quickly before filing them away. Others are scheduled for thinking and/or action using that wonderful 'task manager'. I am *so* looking forward to January when I can return to my day job!